

AOC-856 Doc. Code: SET
Rev. 10-12
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Commonwealth of Kentucky
Court of Justice www.courts.ky.gov
KRS 387.175, 387.670, 387.710
395.610-.657; 395.990



**Periodic/Final Settlement of
Guardian/Conservator For**
[] Minor [] Disabled Person

Case No. _____
Court _____ District _____
County _____

Notice to Guardian/Conservator: File this Settlement one (1) year after appointment and annually thereafter. If the net estate is \$5,000 or less, file this Settlement every two (2) years after the original report.

IN RE: Estate of _____, a [] Minor under 18 [] Disabled Person.

Comes _____, appointed as [] Guardian [] Conservator of the above estate on _____, 2____. This [] Periodic [] Final Settlement indicates, by itemized statement and supported by receipts and vouchers, the assets received and disbursements made since the Inventory or last Settlement was filed. It is submitted pursuant to:

[] KRS 387.710 OR [] KRS 387.175, 395.610 - 395.657 and 395.990

ASSETS & INVESTMENTS

(Include anything of value to the estate including government benefits, Social Security and SSI pension plan benefits, savings and checking accounts, certificates of deposit, all personal property, rents from real estate, and proceeds from the sale of real estate and personal property. Attach additional sheets of paper if necessary).

<u>ITEM</u>		<u>AMOUNT</u>
_____	\$	_____
_____		_____
_____		_____
_____		_____
_____		_____
_____		_____
TOTAL ASSETS RECEIVED:		\$ _____

<u>DISBURSEMENTS</u>		<u>AMOUNT</u>
_____	\$	_____
_____		_____
_____		_____
_____		_____
_____		_____
_____		_____
_____		_____
TOTAL DISBURSEMENTS MADE:		\$ _____

BALANCE **ASSETS LESS DISBURSEMENTS:** \$ _____

For Periodic Settlements - carry balance forward to next report.
For Final Settlements - indicate to whom balance was paid and attach receipt.

IN PERIODIC SETTLEMENTS:

PLAN FOR PRESERVING AND MAINTAINING ESTATE (*not to be filled out if estate has net value of \$5,000 or less*)

IN FINAL SETTLEMENTS:

UNPAID CREDITORS - ALLOWED CLAIMS

AMOUNT

_____	\$	_____
_____		_____
_____		_____
_____		_____
_____		_____
_____		_____
	TOTAL	\$ _____

CREDITORS - DISALLOWED CLAIMS

AMOUNT

_____	\$	_____
_____		_____
_____		_____
_____		_____
_____		_____
	TOTAL	\$ _____

Above-named Guardian/Conservator submits this Settlement to the Court, and if a Final Settlement, asks that the Surety be discharged.

Date

Guardian/Conservator Signature

Guardian's Phone Number

Address

Subscribed and sworn before me on _____, 2_____. My commission expires: _____,
2_____.

Name/Title